




# **WHO WILL TEACH MONTANA'S CHILDREN?**

## **2002 Follow-Up Study**

Report for the  
Certification Standards and Practices Advisory Council (CSPAC)  
of the  
Montana Board of Public Education

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# Who Will Teach Montana's Children?

## 2002 Follow-Up Study

In the early 1990s, Montana schools were well staffed with highly qualified teachers and administrators, despite teachers' salaries that ranked near the bottom in nation. Then in the late 1990s, Montana school districts began to struggle to recruit and retain teachers, administrators, and other certified staff.

Concerns about a teacher shortage prompted the Certification Standards and Practices Advisory Council (CSPAC) of the Montana Board of Public Education to commission Dr. Dori Nielson to do an independent study of the recruitment and retention of certified school personnel. In February of 2001 her report, *Who Will Teach Montana's Children?* was published.

That report indicated that several factors were impacting the turnover of teachers and administrators in Montana schools. High numbers of Montana teachers and new education graduates were being attracted to other states with higher salaries and benefits. Retirements had increased dramatically. And some subject area and administrative positions were extremely difficult to fill.

This follow-up study was designed to find out if anything has changed in the past two years. The information comes from a survey that was sent to all Montana school systems, county superintendents of schools in counties with one- and two-teacher schools, special education district and cooperative programs, and teacher education programs. The response to the survey was overwhelming:

- 88% of the districts, representing 93% of students and staff
- 98% of county superintendents in counties with one- and two-teacher schools
- 90% of special education cooperatives
- 77% of district special education programs
- 100% of teacher education programs

The responses were tallied and sorted by district size, geographic region, and county to determine if the results were representative of Montana. Each subgroup was represented at the 70% level or greater, with the exceptions of the school districts of Roosevelt and Carbon counties. The representative overall percentages were used to project totals in instances where the number of cases or occurrences is cited.

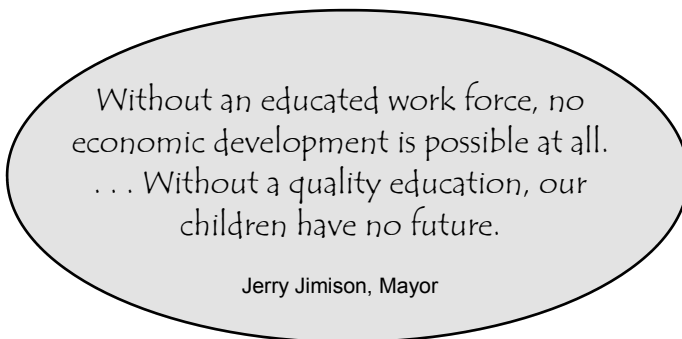
### Overview

The February 2001 report discussed three different kinds of teacher shortages: shortages in specific subject areas, shortages due to many job openings, and shortages because of an inability to attract and retain teachers. This report will take a new look at each type of shortage. It will also discuss severe shortage areas, which combine difficulty in hiring with the proportion of open positions.

Montana Office of Public Instruction (OPI) district size categories and Montana Association of School Superintendents (MASS) geographic regions were used to break down and analyze the data. The MASS regions were diagonally grouped into three areas: the West (Four Rivers, Northwest, and Western regions), Center (Central, North Central, and South Central) and East (Hi-Line, Northeast, and Southeast Regions). In several instances the larger districts were grouped together, as were the smaller districts. **Appendix A** provides a state map of the MASS regions. District size category descriptions can be found in Table B-1 in **Appendix B**.

In general, districts are faced with different predicaments depending on their size. **Appendix B** provides details on several characteristics by size categories and geographic regions. The larger districts in Montana have a disproportionately high number of retirements and eliminated positions. They have disproportionately fewer openings, are likely to have higher salary schedules, and can attract candidates from smaller, lower paying districts. They rely very little on provisional or emergency credentials to fill positions.

The smaller districts have a disproportionately high number of openings. Their proportion of retirements and eliminated positions is considerably lower than their proportion of students and staff. They have a more difficult time filling their openings and rely disproportionately on provisional and emergency credentials to fill positions.



Districts' situations also differ by geographical area. Students and resources are not distributed evenly across Montana. The West one-third is home to half the K-12 students and staff. It includes the teacher education programs at UM Missoula, MSU Bozeman, UM Dillon, and Carroll College. Student enrollment in the West region is declining slower than in the rest of the state, and in some communities enrollment is still growing. School

districts in the West have disproportionately fewer eliminated positions and rely less heavily on provisional and emergency credentials.

The Center one-third has about one-third of the students. It also has several teacher education programs: University of Great Falls, MSU Billings, and Rocky Mountain College. As in the West, the Center region has a lower proportion of eliminated positions and relies less on provisional and emergency credentials compared to the proportion of students and staff.

The East one-third presents a different picture. This area has only about one-seventh of the state's students and staff. Districts in the East disproportionately eliminate more positions, and they use provisional and emergency credentials at about twice their proportion of students and staff. East region schools have more issues of isolation and remoteness than most of the rest of the state. MSU Northern is the only teacher education program for this area. (Although MSU Northern is physically in the north-central part of the state, for purposes of this study the area dividing line runs at a slant, and the Hi-Line area is grouped with the East. See the MASS map in **Appendix A** for region boundaries.)

Both size and location made some difference in how districts are impacted by each type of shortage.

### **Shortage Type: Specific Subject Areas**

As in the earlier study, districts indicated that they experienced difficulty finding qualified applicants to fill positions. The 2002 survey asked respondents to identify how difficult it was to fill positions in each certified area by ranking the difficulty from 1 (easy) to 4 (very hard – no applicants, position not filled, or used emergency measures).

Table 1 lists certification areas that were rated 2.5 or higher in the statewide average. A rating of 2.5 or higher indicates considerable difficulty filling the position, and a rating over 3.0 indicates extreme difficulty. Rankings from the prior report are also included to give a comparison.

As shown in Table 1, the ranking of difficulty has shifted somewhat in the past two years. Music, foreign/world languages, and special education, the top three difficult areas in this survey, were all in the top four in the previous report. However, school psychologist jumped several places up the list. Guidance dropped out of the top four. Computer, vocational, and technical education moved up several notches. Elementary, ranked eighth in the prior report, dropped out of the top ranks altogether. The superintendent position also climbed several notches from the last study.

**Table 1**  
**Difficult-to-Fill Positions by Certification Area**

<b>Certification Area</b>	<b>Difficulty Level</b>	<b>Rank</b>	<b>Rank</b>
	<b>2001-2002</b>	<b>2001-2002</b>	<b>1999-2000</b>
Music	3.4	1	1
Foreign/world languages	3.4	2	4
Special education	3.3	3	2
School psychologist	3.2	4	15
Mathematics	3.2	5	7
Computer education	3.2	6	16
Guidance	3.1	7	3
Vocational education*	3.1	8	10
Library	3.1	9	5
Applied technology	2.9	10	12
Science	2.9	11	9
Special ed administrator	2.9	12	not listed
Superintendent	2.8	13	18
Business	2.8	14	14
Principal (high school)	2.8	15	13 (all principals)
Art	2.5	16	11
English/language arts	2.5	17	17

*\*Includes family and consumer science; applied technology is listed separately.*

A survey of district and cooperative special education programs provided additional information about special education staff. Table 2 indicates that speech pathology and occupational and physical therapy staff would be in the fourth and fifth spots overall for difficulty of hiring. The specialized related-service positions were all rated as difficult to fill. Some respondents would have ranked the difficulties of hiring certain special education related-services staff as a 5, 6, or 7, if they had the option. The

paraprofessional positions have become more difficult because they now require more specialized training.

School districts in some size categories and geographic areas have shortages that are unique to their locations or circumstances. For instance, difficulty filling

**Table 2**  
**Difficult-to-Fill Positions in Related Services**

<b>Certification Areas</b>	<b>Difficulty Level</b>
	<b>2001-2002</b>
Speech pathology	3.3
Occupational and physical therapy	3.3
School nurse	2.9
Paraprofessionals	2.6

elementary positions ranks above 2.0 in only the three smallest district size categories. **Appendix C** lists the ratings of difficult-to-fill positions by district size. **Appendix D** lists them by geographic region.

### **Shortage Type: Many Job Openings**

The number of certified staff positions in Montana schools is only slightly higher than it was two years ago, and the number of openings (at 1,257) is about the same. One in every 10 certified positions were open in 1999-2000 and 2001-2002. This suggests that the shortage at least hasn't deepened since 1999-2000. Table 3 lists the certifications areas with more than 20 openings.

**Changes** Despite the appearance of stability, there have been some changes. The biggest change is in elementary positions, which declined by 100 over the past few years. (However, elementary

<b>Table 3</b>		
<b>Greatest Number of Openings, 2001-2002</b>		
<b>Certified Area</b>	<b># of Openings</b>	<b>% of Total Positions</b>
Elementary	322	8.5%
Special education	117	14.0%
Mathematics	81	12.5%
English/language arts	77	10.5%
Music	64	17.0%
Guidance	57	11.0%
History/social science	55	11.3%
Principal	44	7.4%
Science	42	8.3%
Vocational education*	52	16.8%
Foreign/world languages	41	20.0%
Health enhancement	33	6.5%
Art	28	12.5%
Superintendent	24	12.1%
Business	22	14.1%
<i>*Does not include applied technology, which is listed separately.</i>		

teachers still account for about one-fourth of all certified staff.)

Other changes include increases in positions in two federal programs, special education and Title 1.

Elementary enrollment has been dropping for several years. At first it was offset by increases in high school enrollment, but now high school numbers are beginning to decline, too. Montana is not alone – nearly half of the states are experiencing enrollment decreases. (Unfortunately for Montana schools,

districts in Nevada, Colorado, Florida, and California are still experiencing enrollment increases, and they recruit aggressively in Montana.)

It would seem that declining enrollment would alleviate a teacher shortage, but that is not the case. In reality, declining enrollment creates unpredictable consequences for school districts, causing major problems in staffing, funding, and budgeting.

**Retirement** Also complicating the picture is the large number of retirements from the Montana system. In 20001 The Teachers' Retirement System (TRS) reported 559 retirements. The average age was slightly younger than in 2000 - 57 years old, and the average monthly benefit declined by \$22, the first decline since 1990. In the decade between 1991 and 2001, retirements from TRS increased by 98%. Retirements were up 7% between 2000 and 2001. The high number of retirements is likely to continue for several years. Each year from now until about 2006, approximately 1,500 to 1,600 Montana educators will be eligible for retirement – at least 50 years old with 25 years of service.

Several factors make it difficult to determine exactly how many TRS retirements are from K-12 and how many from postsecondary. In the survey, school districts estimated that there were 331 retirements for 2001-2002. That number is probably somewhat low, but even 331 retirements is a significant number of teachers leaving the K-12 system. About one-third of the retirees in 2001-2002 were elementary teachers, accounting for 2.7% of all elementary positions.

Retirement has a greater impact on large districts than on small ones. The seven largest districts in the state (Billings, Great Falls, Missoula, Bozeman, Helena, Butte, and Kalispell) have the highest rate of retirements. Their reported retirements in 2001-2002 were 5% of their overall staff, compared to a state average of 3%. The smallest size category (40 or fewer students) reported no retirements. The major reasons for staff turnover in the smaller districts were to receive higher salaries and to move to another district either in or out of state. It is possible that many certified staff in the smaller districts move to larger school systems before they reach retirement age.

### **Shortage Type: Inability to Recruit and Retain Staff**

Teacher turnover is still a major problem for many Montana districts. So is finding enough qualified applicants to fill available positions – especially in certain subject areas. Montana's low salaries remain the biggest obstacle. Still, there are glimmers of hope in Montana's ability to recruit and retain teachers and other certified staff.

**Montana Teacher Education Programs** The percent of teacher education program graduates who stay in Montana to teach within two years of completing their programs appears to have remained stable at 29% in the years examined for this study. In 2001-2002, 1045 students completed programs. This is a jump of about 150 over the previous year. If 29% of this year's graduates stay in Montana to teach, that translates into nearly 50 more graduates teaching in our schools.

Deans of Montana's teacher education programs were also asked to identify how many students completed programs in music, special education, guidance, and foreign languages – the most difficult positions to fill in the previous study. Table 4 lists those areas and matches them with the number of openings in 2001-2002. The results are eye-opening. Even if all the Montana education graduates wanted to teach in Montana, there aren't enough of them prepared in the shortage areas. Clearly, Montana's teacher shortages aren't simply problems of retirement, people leaving the profession, or out-of-state recruitment.

The shortfalls in these areas were filled in many ways. Some openings were filled with current teachers who had endorsements in these areas, or teachers who got provisional certificates or emergency authorization. Other teachers were new to Montana or were returning to education from some other job or activity. But some positions went unfilled, were eliminated, or were assigned to unqualified personnel. Accreditation reports often note deviations from certification requirements for music, foreign languages, and guidance.

**Table 4**  
**Montana Teacher Education Completers – Shortage Areas**

	<b>2001-2002</b>	<b>2000-2001</b>	
	<b>MT Openings</b>	<b>Program Completers</b>	<b>Difference</b>
Special education	118	85	-33
Principal/superintendent/specialist	89	85	- 4
Music	64	15	-49
Guidance	57	31	-26
Foreign/world languages	40	33	- 7

The number of administrative openings and the number of completers are very close. In addition, certification records show that 230 teachers in our schools have administrative certification but are not employed as administrators. The shortage in this area does not appear to be a shortage of certified personnel. A coalition of Montana education agencies and organizations are currently examining recruitment and retention of school administrators in Montana, and their work may have some impact in this area.

As an added wrinkle, many of the students completing special education and administrative programs may already be employed in the schools. Internship and special endorsement programs provide on-the-job training while earning necessary credentials. The OPI Special Education Endorsement Project provides stipends for already certified teachers to obtain a special education endorsement while on the job. To date, 117 students have completed the program, and 65 are currently enrolled. Preference has been given to teachers in rural settings.

### **Hiring and Recruitment** Each year

the Missoula, Bozeman, and Billings campuses host teacher career fairs.

The number of recruiters from other states has increased each year for several years. These



recruiters come with contracts in hand, offers of high salaries and signing bonuses, and assistance with moving expenses and loans. Montana recruiters have been disappointed and embarrassed by the lack of interest in their schools.

But this year there was evidence of some change. The salaries offered by recruiters were still much higher out of state and just as low in state. But the number of out-of-state recruiters was down somewhat. They were also more targeted to their shortage areas (which unfortunately are the same as those in Montana). But Bozeman held a Montana-only job fair, and Missoula had a breakfast gathering just for Montana schools. More candidates looked at the Montana schools. More Montana recruiters came prepared to make specific and speedy offers.

**Salaries** Still, high out-of-state salaries are a powerful draw. There were many experienced teachers, as well as new graduates, who were looking for out-of-state positions. Many of the experienced teachers plan to retire from the Montana system and move to teach somewhere near their children, who themselves may have left the state for higher paying jobs elsewhere. That's a double hit to Montana education – experienced teachers retiring, with grandchildren filling desks in other states.

In 2001-2002, Montana ranked 46<sup>th</sup> among the states for average teachers' salary, at \$34,379. Montana is \$9,666 behind the national average of \$44,045. Even if the political powers started now to interrupt that cycle by supporting higher salaries, it would take an immediate infusion of \$60 million to get halfway to the average teachers' salary – and that doesn't include the associated benefits. Montana has been competing for the bottom ranking for several years, not only for average teachers' salaries but also for salaries of state employees, government officials, and the general public. Low Montana salaries and high out-of-state salaries have had a dramatic effect on recruitment and retention of Montana teachers and administrators. Low salaries are part of a cycle that affects the entire economic picture in Montana. Many of Montana's young people in other professions would like to stay, but they are leaving the state for the same reasons teachers and administrators are leaving. They take with them their young children, their tax potential, and their support for schools in their home state.

**Provisional Certification and Emergency Authorization** Districts sometimes rely on Class 5 provisional certificates and emergency authorizations to fill positions. Provisional certificates are awarded for a maximum of three years to allow an already certified person to complete requirements for endorsement in that subject area. Emergency authorization is awarded for essential positions that must be filled but have no qualified persons available.

The inability to fill positions with qualified personnel is illustrated by the increased reliance on provisional certification and emergency authorization over the past five years. Emergency authorization has tripled from seven to 21, and the number of teachers employed with provisional certificates is up 65%, from 334 in 1998-1999 to 558 in 2001-2002.

The inability to fill positions with qualified personnel also affects school accreditation. Regular accreditation status is awarded to all Montana public schools and private schools seeking accreditation that meet the Board of Public Education standards. Those not meeting some standards receive accreditation “with advice” or “with deficiency.” Only on rare occasions has a school been recommended for non-accreditation status.

Since 1995-1996, schools not meeting some accreditation standards increased from 6% to 17%. The reasons cited for receiving “with advice” or “with deficiency” status are most often the lack of appropriate number of administrators, lack of program offerings in specific subjects (mostly music, second languages, library, or guidance), misassigned teachers, and a third or fourth deviation from standards.

**Turnover** The 2002 survey asked respondents to indicate the main reasons for staff turnover in their districts. The range was from 1 (little or no influence) to 4 (strong influence). Average scores up to 2.0 indicate relatively small influence, from 2.0 to 2.5 moderate influence, 2.5 to 3.0 substantial influence, and 3.0 and higher a very strong influence. Table 5 shows that higher salary was the reason cited most often for certified staff leaving their positions in 2001-2002. It was well ahead of the other factors. Two years ago retirement was considered the primary reason for turnover. The next three high-rated factors are consistent with the top three factors two years ago.

The major reasons for teachers leaving their positions seem to be interrelated — to obtain higher salaries, to retire, and to get another position in or out of state. Statewide, the most significant reason for teacher turnover was to earn higher salaries. The larger school districts cited retirement as their highest rated reason, obtaining higher salaries second, and out-of-state jobs third. The smaller districts ranked higher salary first and retirement last. It is no surprise that smaller districts consider

**Table 5**  
**Reasons for Certified Staff Leaving Positions**

2001-2002			1999-2000	
Rank	Rating	Reason	Rank	Reason
1	2.8	Obtain higher salary	1	Retirement
2	2.3	Position out of state	2	Another position in state
3	2.1	Retirement	3	Position out of state
4	1.9	Another position in state	4	Non-retention/reductions
5	1.7	Left education	5	Left education profession
6	1.6	Non-retention/reductions	6	Took a leave or back to school



retirement an insignificant factor. The two smallest size categories reported a total of only nine retirements, accounting for only 2.7% of the retirements statewide. The second and third most substantial factors in small schools were taking out-of-state jobs or other positions in state.

When breaking it down by geographic area, all three regions – West, Center, and East – agreed on the major reasons for certified staff turnover. The regions rated higher salaries, jobs in other Montana districts, and jobs out of state as the top three factors, in that order. Retirement was considered significant by the five MASS regions that include the seven largest districts in the state. All other factors received indifferent ratings.

The smallest elementary schools (40 or fewer students) experience the highest rate of turnover each year. With 1% of the certified staff in the state, they represent 20% of the total elementary teacher turnover in the state. Over a third of the teachers' positions in these elementary schools are open each year.

**Appendix E** provides tables of reasons for leaving positions by school size and geographic area.

**Other Influences** Schools were asked to rate other factors that influence the recruitment and retention of certified staff. Table 6 lists the ratings. The factors have rearranged themselves since 1999-2000. Finance-related reasons are now at the top of the list. Of those districts identifying enrollment changes as an influence, 84% reported that enrollment was down.

**Table 6**  
**Other Factors Influencing Turnover**

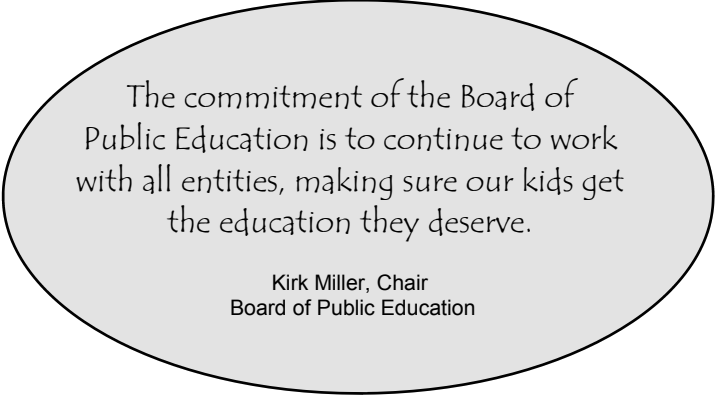
2001-2002			1999-2000	
Rank	Rating	Influencing Factor	Rank	Influencing Factor
1	3.1	Low salary	1	Small town/remoteness
2	2.9	Lack of state support	2	Higher salary, lack of benefits
3	2.7	Annual budget uncertainty	3	Time for change or retirement
4	2.6	Lack of benefits	4	Family/personal/cultural reasons
5	2.4	Isolation	5	Work load/disillusioned
6	2.4	Enrollment change	6	Lack of housing
7	2.0	Increasingly needy students	7	Other opportunities
8	2.0	Personal/family issues	8	Budget & levy issues/enroll change

Districts indicated that the most substantial influence on turnover was low salaries and the lack of state support for any change in that status. All size categories, except the two smallest, rated the lack of state support as the factor that most influences turnover. Those two smallest size categories indicated that low salaries create their greatest problems. All other size groups rated that as the second reason. Annual budget uncertainty was rated third by all except the smallest size category. They identified the lack of benefits and isolation/small community issues as their second and third most potent factors in staff turnover.

Low salaries and lack of state support are also the top influences when viewed by geographic area. The East is the largest area geographically, but the smallest in student population. It is no surprise that isolation is a factor in the eastern districts. One of the Center regions (the North Central MASS region – see **Appendix A**) also indicated that isolation was a major factor in turnover. Lack of benefits and declining enrollment were also ranked as substantial influences in all areas.

**Appendix E** provides tables of influences on staff turnover by district size and geographic area. **One- and two-teacher schools** Montana still has many remote rural schools with only one or two teachers. This is true for almost all of the 100-plus districts that have fewer than 40 students (OPI classification 6E – see **Appendix B**). For 2001-2002, these districts reported that 60 of 160 certified staff positions needed to be filled. They reported about the same number for 2002-2003. That is 38% turnover of total staff each year, and about 20% of the total elementary teacher turnover for the state.

However, these schools seem to experience the other extreme as well. Many of these districts indicated that they had no experience with turnover. Teachers in these districts had held their jobs from 15 to 25 years.



The commitment of the Board of Public Education is to continue to work with all entities, making sure our kids get the education they deserve.

Kirk Miller, Chair  
Board of Public Education

The county superintendents indicated that higher salaries and increased benefits would make a distinct difference in the turnover rate for the smallest schools. Some of them crossed out the word “increased benefits” and wrote in “any benefits.” But they also had upbeat things to say about one- and two-teacher schools. Those that are close to a larger city reported from five to 12 applications for any position. They cited the benefits of low class size, beautiful scenery, independence, challenges, and few discipline problems. The following classified advertisement from the *Missoulian* illustrates that spirit:

One-room school...seeks creative teacher for multi-grade classroom. No more than 10-1 student/teacher ratio, ages 6-12. We emphasize hands-on, developmentally appropriate learning.

Only the two smallest district size categories and the North Central region indicated that there was considerable difficulty filling elementary positions. The smallest districts reported that library and guidance standards were met by using alternative standards or by good luck – for example, a retired counselor in the area, a county superintendent with guidance credentials, a cooperative neighboring district, or a county librarian that travels to the schools.

**Retention Incentives** The 2002 survey also asked districts to identify factors that might improve staff retention and recruitment. All size categories identified higher salaries and better health benefits as the most significant factors. Third was strong parent and community support. Smaller classes and stronger parent/community support were rated very high by the larger districts and by districts in the West region. As might be expected, smaller class size was not rated as an important issue in small schools or in the East or Center regions.

Continuing support for staff – professional support networks, mentoring, and relevant professional development – was strongly supported by most of the nine MASS geographic regions (see map in **Appendix A**). The Southeast and South Central regions were somewhat lukewarm to all factors. The larger districts strongly supported all factors. The Four Rivers and Hi-Line regions were particularly strong in their ratings of professional support networks, mentoring, and relevant professional development. Table 7 lists the rankings by geographic area, district size, and statewide average.

**Table 7**  
**Factors that Might Improve Staff Retention and Recruitment**

Factor	Geographic Area			District Size		Statewide Average
	West	Center	East	Larger	Smaller	
Higher salaries	3.8	3.8	3.7	3.8	3.7	3.8
Better health benefits	3.4	3.6	3.3	3.5	3.4	3.4
Strong parent/community support	2.6	2.4	2.4	3.0	2.4	2.4
Relevant professional development	2.6	2.3	2.2	2.6	2.3	2.4
Professional support networks	2.5	2.3	2.4	2.5	2.4	2.4
Mentoring	2.4	2.3	2.2	2.5	2.3	2.4
Smaller class size	2.3	1.7	1.6	2.7	1.7	1.9

### **Shortage Type: Severe Shortages**

For some certification areas, open positions are both numerous and difficult to fill. Based on the results from this survey, severe shortage areas are defined as those areas that have a combination of the highest rankings in most difficult to fill and the highest proportion of open positions to total number of positions. The severe shortage areas identified are foreign/world languages, music, school psychologist, vocational education, speech pathology, special education, and mathematics. There is a second group of shortage areas that are not quite as difficult to fill but that still need to be watched to determine the trend. The list of considerable shortage areas includes guidance, business, superintendent, high school principal, and art. Table 8 details the openings and difficulty ratings of both the severe and considerable shortage areas.

**Table 8**  
**Severe and Considerable Shortage Areas – 2001-2002**

	Difficulty Rating	# of Openings	% of Total Positions
<b>Severe Shortage</b>			
Foreign/world languages	3.4	41	20.0%
Music	3.4	64	17.0%
School psychologist	3.3	16	18.2%
Vocational education	3.3	42	16.8%
Speech pathology	3.3	28	16.4%
Special education	3.3	117	14.0%
Mathematics	3.2	81	12.5%
<b>Considerable Shortage</b>			
Guidance	3.1	57	11.0%
Business	2.8	22	14.1%
Superintendent	2.8	24	12.1%
Principal (H S)	2.9	21	11.0%
Art	2.5	28	12.5%

## **Where Are We Now?**

In 1999-2000, the teacher shortage problem in Montana was wide and deep. It is still wide and deep – but it seems it hasn't gotten deeper. Many of the same problems are still apparent. School districts have about the same number of open positions. Salaries are still very low, and the prospect for increased funding is dim. Retirement levels are still high. The teacher job fairs continued to attract out-of-state recruiters offering higher salaries and other perks.

There are red flags as well: increasing accreditation deviations, increasing reliance on provisional certification and emergency authorization, and dropping programs or courses due to lack of qualified personnel. These solutions to teacher shortages are evidence that the problems are affecting the availability of quality programs for Montana students.

Most of the problems are deep rooted and will take several years to reverse. It has taken a great deal of effort just to keep the shortages from reaching deeper. The 1999-2000 report *Who Will Teach Montana's Children?* listed several strategies for reversing the trends. Many of those strategies are underway and may have begun to impact the shortages. Following are a few examples of the efforts that are under way.

A public dialogue has been taking place. At the state level several groups recognized the existence of a teacher shortage and have come together to discuss it.

- The Alliance for Montana's Future, a group of business and professional leaders, recognized the role that a strong education system plays in the economic future of Montana. They are focusing energy on Montana's education issues.
- Stand Up for Education meetings were held across the state in April and May. The high-profile meetings were sponsored by education organizations. They allowed many Montanans to participate in a dialogue about state and local education issues.
- The Montana School Board Association (MSBA) included the discussions of recruitment and retention in their statewide workshops.
- The media have devoted more attention and space to education issues.
- The Montana Unified School Trust has been sponsored by the Montana Education Association-Montana Federation of Teachers (MEA-MFT), Montana School Boards Association, and School Administrators of Montana (SAM). The Unified School Trust is a self-funded, multi-district insurance pool, governed by Montanans, which will help smaller school districts offer health benefits to their workers.

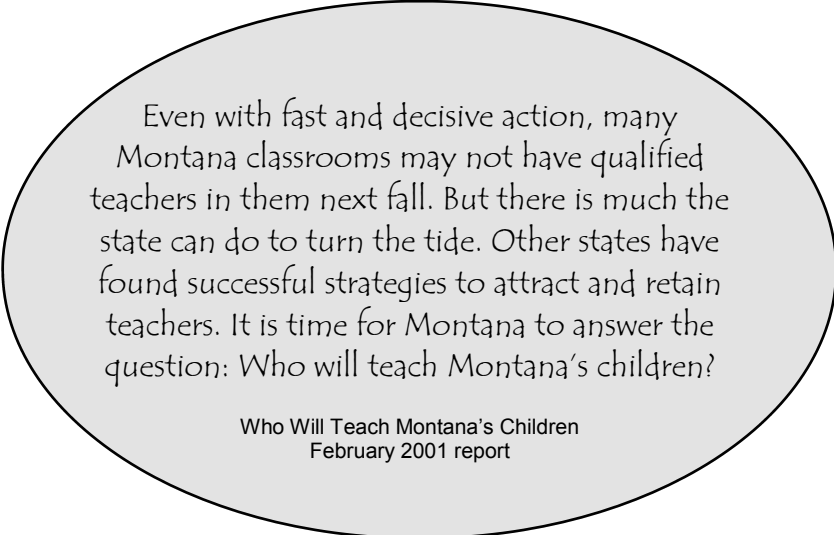
There are indications that some strategies may be making inroads into the shortages.

- The cooperative programs between community colleges and existing teacher education programs have increased the number of new teachers being prepared in underserved areas. They may or may not be staying in Montana to teach. Likewise, it is unclear whether the numbers of teacher education graduates will continue to increase. As long as the percent staying in the state does not drop any lower than 29%, the number of graduates remaining to teach in Montana may increase.
- The teacher job fairs were not as dismal for Montana recruiters as past years. Several districts reported some promising in-state prospects. MSU Bozeman held a Montana-only job fair. UM Missoula had a Montana-only breakfast gathering. However, districts were forced to be more competitive in the hiring process. They identified incentives and qualities that would make teachers want to live and work in their districts. Missoula Public Schools was one district that adjusted their internal processes to be able to have contracts in hand at the job fairs, rather than weeks after the good prospects had been snapped up with solid offers. Great Falls and Browning are examples of districts that have offered signing bonuses for difficult-to-hire positions.
- The OPI Special Education Endorsement program provides stipends for already certified teachers to obtain special education endorsement while on the job. That program appears to

be narrowing the shortage in special education teachers. Special education is also providing distance learning opportunities to target the speech pathology shortage. Some other programs that have federal funding or available grants, such as vocational education and math, have some access to financial resources that allows them to create strategies for reducing shortages.

State level policy makers have recognized the shortage and are taking steps to address the issues.

- The Board of Public Education focused on policies that could impact the shortages. They adopted a temporary rule revision to allow a person with appropriate certification and preparation in another state to qualify for a Montana teaching certificate. Recommendations will be forthcoming to the board to extend that revision to special education. Additional recommendations will address some special education administrative changes.
- A proposal has been drafted that could extend teachers' and administrators' careers in Montana. It would allow educators who wait to retire until they have 30 years of service or are at least 55 years old to get retirement benefits up to 60% of their average final compensation, rather than the current 50%. That could increase the work force by 200 to 300 per year. This plan does include costs that would have to be borne by the general fund, employee and employer contributions, or some combination.
- The Board of Regents of the university system put the issue of K-12 recruitment and retention on their radar screen, with the intention of determining how they can work with state agencies and school districts to address the problem.
- A coalition of Montana education agencies is examining the recruitment and retention of school administrators. Strategies and recommendations may be generated from the results.



Even with fast and decisive action, many Montana classrooms may not have qualified teachers in them next fall. But there is much the state can do to turn the tide. Other states have found successful strategies to attract and retain teachers. It is time for Montana to answer the question: Who will teach Montana's children?

Who Will Teach Montana's Children  
February 2001 report

- Consortia of small schools have come together to meet collective demands for professional development and support networks. They are attempting to maximize limited funding through grants and cooperation with other agencies. The consortia in the East region have the fewest resources and the greatest need. Even in the West and Center regions where the schools are not as remote, consortia have demands for services well beyond their capacities.

The districts overwhelmingly identified Montana's low salaries as a primary factor in teacher turnover and inability to recruit qualified personnel. Other financial issues also contribute to the problem — lack of state support, lack of benefits, and annual budget uncertainty. Stable funding is needed to support higher salaries.

Even if stable funding and higher salaries become a reality, some of the identified problems would still require creative problem solving.

- Little financial assistance is available to focus on the shortages in music and foreign/world languages. Unless creative solutions are developed to bring people with foreign language and musical skills into the classrooms, schools will continue to be in violation of standards, and students will continue to be deprived of these programs.
- Many teachers in the schools have administrative qualifications but are not serving in administrative positions. The shortages in these areas will have to be addressed with strategies that extend beyond higher salaries. The factors that keep these teachers from becoming administrators need to be identified and addressed.
- Montana needs to develop organized strategies to support consortia in their efforts to meet the needs of educators in rural Montana. Larger districts may be able to rely on internal resources to address these areas, but they would also benefit from some coordinated efforts. Particularly for small schools in central and eastern Montana, there is a strong need for professional networks, relevant and targeted professional development, and mentoring programs.
- More concerted and coordinated efforts between agencies, colleges, schools, and education organizations are needed to meet the staffing needs in rural Montana. Although efforts exist to deliver teacher education programs to remote locations, there is no plan to assure access to these programs for people who are committed to their rural communities. Coordinated action would maximize the efforts of other entities struggling to serve the needs of rural communities — groups working on economic development, medical and dental services, and agricultural issues.
- The statewide teacher salary figure is out of date. It has been projected forward with inflation figures since the early 1990s and may be inaccurate. Considering the high number of retirements, the actual average salary is likely to be lower than the projected numbers because the salaries of beginning teachers are significantly lower.

In the current world atmosphere, perhaps being rural and isolated can be a positive prospect in hiring and keeping the teachers and other school staff that Montana districts need. At least there has been public recognition that teacher salaries are low and that those who stay here to teach are giving up something to do it. But without stable funding and movement toward higher salaries, Montana's schools will continue to struggle with shortages of qualified personnel in the schools.

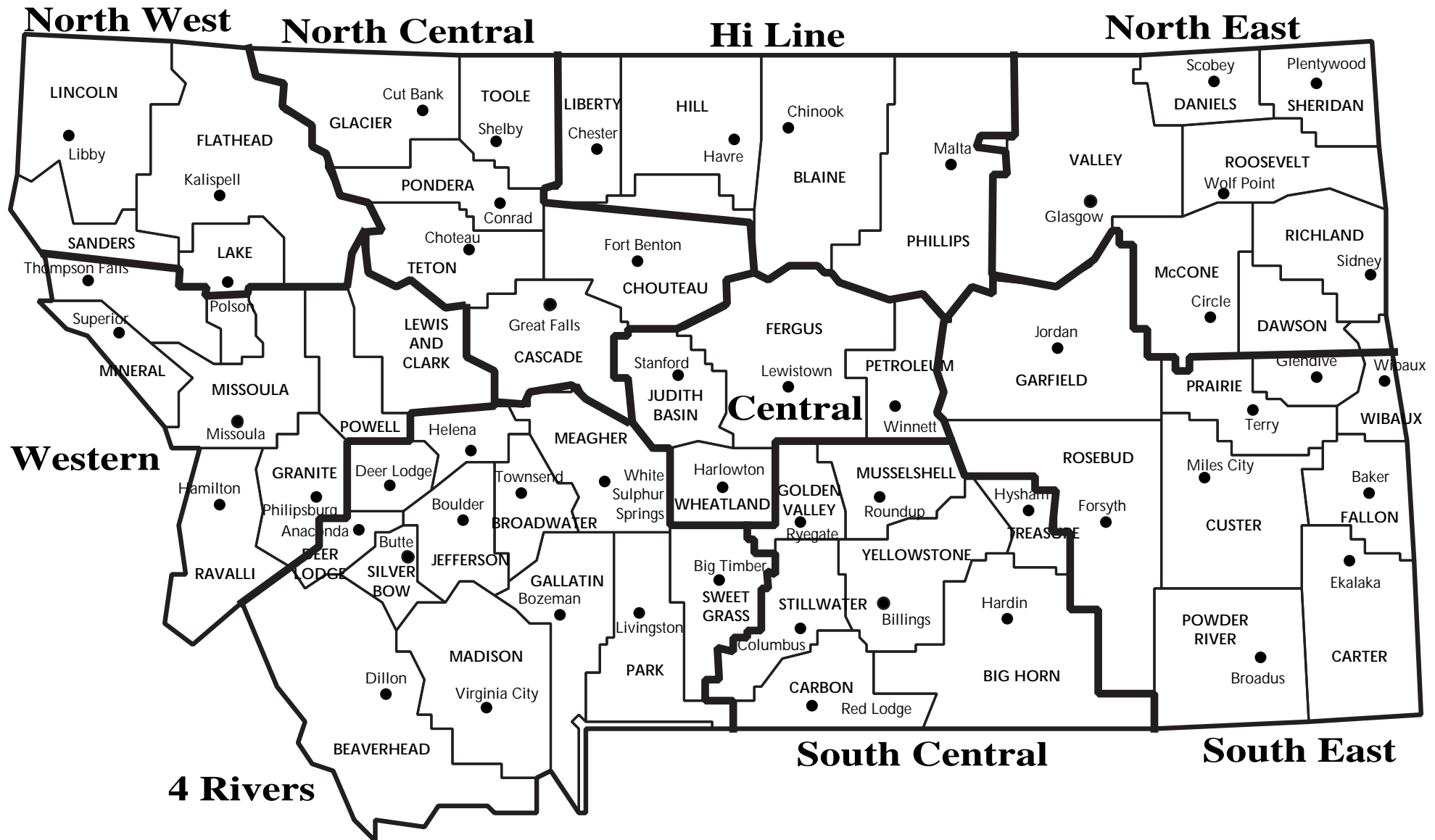




# **Appendices**



# Montana Association of School Superintendents



**April 2001**



## Appendix B

### District Size Categories and Characteristics

Averages often mask issues and present a generic picture that no one can identify with. The nine administrative regions used by the Montana Association of School Superintendents (MASS) and the eight district size categories used by the Office of Public Instruction (OPI) were used to examine the data. Appendix A provides a state map of the MASS regions. The OPI District size categories are shown in Table B-1.

**Table B-1**  
**District Size Categories**

<b>Size Category</b>	<b>Enrollment Elementary</b>	<b>Enrollment High School</b>
1E 1H	over 2000	Over 1250
2E 2H	851-2000	401-1250
3E 3H	401-850	201-400
1K	K-12 400 or greater	
4E 4H	151-400	76-200
2K	K-12 399 or fewer	
5E 5H	41-150	75 or fewer
6E	40 or fewer	

Table B-1 provides a perspective of the number of students served in each grouping used for analysis. In some instances, the larger districts were grouped together as were the smaller districts. The larger districts included those systems and districts in the size categories with more than 600 students (only two in the 1K category have fewer than 600 students) and independent elementary schools with more than 400. The others were grouped as smaller districts.

**Table B-2**  
**2001-2002 Enrollment by Size Category and Geographic Region**

<b>District Size Categories</b>			<b>MASS Regions</b>		
<b>Larger districts</b>	<b>Enrollment</b>	<b>% of Total</b>	<b>West</b>	<b>Enrollment</b>	<b>% of Total</b>
1E 1H	59,771	39%	Northwest	19,040	12%
2E 2H	28,843	19%	Four Rivers	34,728	23%
3E 3H	16,650	11%	Western	25,278	17%
1K	11,781	8%	West total		52%
Total		77%	<b>Center</b>		
<b>Smaller districts</b>			North Central	20,681	13%
4E 4H	18,930	13%	Central	3,057	2%
2K	5,629	4%	South Central	28,540	19%
5E 5H	7,993	5%	Center total		34%
6E	1,290	1%	<b>East</b>		
		23%	Hi-Line	6,100	4%
			Northeast	7,316	5%
			Southeast	7,126	5%
			East total		14%

The MASS regions were grouped into three areas: the West (Four Rivers, Northwest, and Western regions), Center (Central, North Central, and South Central regions), and East (Hi-line, Northeast, and Southeast regions). The East has the largest territory and the smallest enrollment – the geographic reality of Montana.

When the districts were grouped by large and small districts, the survey results indicated the total retirements, openings, eliminated positions, and provisional and emergency certifications are disproportionate to the numbers of staff and students. Table B-3 indicates that the larger systems have about three-fourths of total students and certified staff in the schools. But they have a higher proportion of retirements and eliminated positions, and are less reliant on provisional or emergency credentials to fill positions. The smaller districts have disproportionately fewer retirements and eliminated positions but are faced with a much higher proportion of openings, provisional certification, and emergency authorizations.

**Table B-3**  
**Percent of State Totals by School Sizes, 2001-2002**

<u>School Systems</u>	<u>Certified</u>			<u>Net Eliminated</u>		<u>Provisional/ Emergency</u>
	<u>Students</u>	<u>Staff</u>	<u>Retirements</u>	<u>Openings</u>	<u>Positions</u>	
Larger districts	77%	71%	84%	56%	90%	35%
Smaller districts	23%	29%	16%	44%	10%	65%

The number of openings relative to the number of staff translates into the larger districts having 8% of their certified positions open in 2001-2002. The smaller districts had to fill 17% of their certified positions.

When the same data is grouped by geographic area, Table B-4 shows the percentages are again disproportionate for eliminated positions and provisional certification and emergency authorizations. The West and Center are disproportionately low in eliminated positions and provisional certifications and emergency authorizations when compared to the percent of students and staff. The East is disproportionately high in eliminated positions and provisional and emergency credentials – about double the ratio of students and staff.

**Table B-4**  
**Percent of State Totals by Geographic Area, 2001-2002**

<u>Region</u>	<u>Certified</u>			<u>Net Eliminated</u>		<u>Provisional/ Emergency</u>
	<u>Students</u>	<u>Staff</u>	<u>Retirements</u>	<u>Openings</u>	<u>Positions</u>	
West	52%	49%	51%	52%	43%	39%
Center	34%	34%	34%	32%	24%	29%
East	14%	17%	15%	16%	33%	32%

Ratings of Difficult-to-Fill Positions by District Size, 2001-2002											
Size	Enrollment		District size		Foreign/world	Special		Computer		Vocational	
category	Elementary	High School	rating	Music	languages	education	Math	education	Library	education	Guidance
1E 1H	over 2000	over 1250	2.5	3.3	3.3	3.4	2.6		2.7	2.5	3.0
2E 2H	851-2000	401-1250	2.6	2.8	3.0	3.2	2.9	3.3	2.8	3.3	2.5
3E 3H	401-850	201-400	2.5	3.7		1.7	3.0		2.5	4.0	4.0
1K	K-12 400 or greater		2.6	3.6	3.0	3.3	3.0	2.5	2.0	3.3	3.3
4E 4H	151-400	76-200	2.7	3.4	3.5	3.6	3.4	3.0	2.9	2.4	3.1
2K	K-12 399 or fewer		2.7	3.7	3.5	3.5	3.8	3.3	2.9	2.9	3.2
5E 5H	41-150	75 or fewer	3.0	3.3	3.3	3.0	3.1	2.7	3.2	3.7	3.2
6E	40 or fewer		2.8					2.5	3.4		3.4
Overall			2.7	3.4	3.4	3.3	3.2	3.2	3.1	3.1	3.1
Size	Enrollment				Applied	Superin-		H School		English/	
category	Elementary	High School		Science	Technology	tendent	Business	Principal	Art	Lang Arts	Elementary
1E 1H	over 2000	over 1250		2.4	2.5	3.0	2.0	3.5	1.9	2.1	1.3
2E 2H	851-2000	401-1250		3.3	3.0	2.5	3.0	3.0	2.5	2.6	1.8
3E 3H	401-850	201-400		3.0		3.0	3.0	3.0	2.5	3.0	1.4
1K	K-12 400 or greater			3.3	2.0	2.0	3.0	3.3	2.0	2.4	1.4
4E 4H	151-400	76-200		2.8	2.9	3.1	2.4	2.9	2.5	2.3	1.8
2K	K-12 399 or fewer			2.9	3.0	2.7	2.6	1.8	2.4	2.3	2.1
5E 5H	41-150	75 or fewer		3.1	3.3	3.1	3.4	2.7	3.0	3.0	2.5
6E	40 or fewer								3.0		2.5
Overall				2.9	2.9	2.8	2.8	2.8	2.5	2.5	2.1

## Appendix C

Ratings of Difficult- to-Fill Positions by Geographic Region, 2001-2002									
	Regional		Foreign/world	Special		Computer		Vocational	
MASS regions	rating	Music	languages	education	Math	education	Library	education	Guidance
Central	2.9	2.8	3.0	2.7	2.7	4.0		3.8	2.0
Four Rivers	2.6	3.3	3.4	3.1	2.9	3.0	3.2	2.6	3.2
Hi-line	3.3	3.8	4.0	4.0	4.0		3.8	3.8	2.7
North Central	2.6	2.5	2.7	2.7	3.4	3.0	3.2	3.0	2.7
Northeast	3.3	4.0	4.0	4.0	3.1	4.0	3.3	4.0	3.7
Northwest	2.6	3.3	3.4	3.3	2.7	3.0	2.8	2.5	3.0
South Central	2.8	3.7	4.0	2.7	3.6	3.4	3.2	4.0	3.4
Southeast	2.8	4.0	3.7	3.2	3.6	3.3	3.0	3.3	2.5
Western	2.5	3.5	3.1	3.6	3.0	2.9	2.3	2.4	2.0
Overall	2.7	3.4	3.4	3.3	3.2	3.2	3.1	3.1	3.1
			Applied	Superin-		H School		English/	
MASS regions		Science	Technology	tendent	Business	Principal	Art	Lang Arts	Elementary
Central		3.0	4.0	3.0	3.3	4.0	3.3	3.4	2.3
Four Rivers		2.4	2.6	2.6	2.0	2.8	2.1	2.3	2.1
Hi-line		4.0		3.3	3.3		4.0	3.5	1.7
North Central		2.7	2.7	2.8	2.8	3.2	2.5	2.6	2.5
Northeast		3.6	4.0	4.0	4.0	3.0	3.0	3.5	1.2
Northwest		1.8	3.3	3.0	2.6	3.0	2.6	2.5	2.2
South Central		3.0	3.0	3.3	3.8	3.0	2.2	2.3	1.9
Southeast		3.8	3.0	2.5	2.7	2.3	3.3	2.0	2.3
Western		2.9	2.8	2.6	2.7	2.4	2.2	2.2	1.8
Overall		2.9	2.9	2.8	2.8	2.8	2.5	2.5	2.1

Table E-1

## Reasons for Leaving Positions, 2001-2002

District Size		
Rank	Larger systems (1E 1H, 2E 2H, 3E 3H, 1K)	Smaller systems (4E 4H, 2K, 5E 5H, 6E)
1	Retirement	Higher salary elsewhere
2	Higher salary elsewhere	Getting teaching job out of state
3	Obtaining teaching job out of state	Obtaining teaching job in state

Geographic Area			
Rank	West	Center	East
1	----- Higher salaries elsewhere -----		
2&3	----- Obtaining other teaching job, in and out of state -----		

Table E-2

## Other Influences on Staff Turnover, 2001-2002

District Size		
Rank	Six largest size categories (1E 1H, 2E 2H, 3E 3H, 4E 4H, 1K, 2K)	Two smallest size categories (5E 5H, 6E)
1	Lack of state support	Low salaries
2	Low salaries	Lack of state support (5E 5H) Lack of benefits (6E)
3	Annual budget uncertainty	Isolation/small community issues
4,5,6	Enrollment changes Insecurity of positions Increasing intensity of student needs	Annual budget uncertainty Lack of benefits (5E 5H) Lack of state support (6E)

Geographic Area			
Rank	West	Center	East
1	----- Low salaries-----		
2	----- Lack of state support for education -----		
3	----- Annual budget uncertainty -----	Isolation, small community issues	
4	----- Lack of benefits -----	Annual budget uncertainty Lack of benefits (5E tH)	
5		Lack of state support (6E)	